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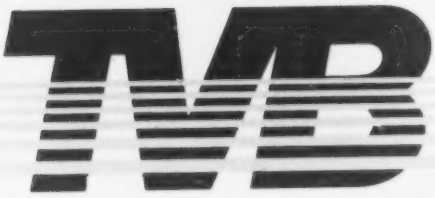

A RESEARCH TREND REPORT

TRENDS
IN MEDIA

- Audience
- Costs
- CPM'S

8/90

Prepared by the TVB Research Department

Television Bureau of Advertising, Inc., 477 Madison Avenue, New York, New York 10022 (212) 486-1111

Highlights

* Network CPM's, Feb. '90 vs. Feb. '89, increased in every daypart. Daytime CPM's were up 21%, Early Evening News was up 20%, Nighttime gained 16%, and Late Evening rose 6%. (see pages 3-5)

* Spot CPM's, 1st Q '90 vs. 1st Q '89, posted increases across the board. Daytime and Early Evening were both up 2%. Early News was up 4% while Late News posted a 5% increase. Nighttime was up 5% and Late Night gained 2%. (see pages 6-7)

* Magazine circulation was down 6.5% due in part to National Geographic dropping from the top 50 revenue list with it's 10.7 million circulation. Despite this decline, CPM's rose an average of 10.2% in 1989. (see page 8)

* Newspaper's total daily circulation again failed to keep up with household growth, so newspapers per household fell to a new all time low of .68. The Sunday editions have been holding at the .67-.68 level for the last nine years. (see pages 11-12)

* The number of Morning newspapers remained unchanged at 501 in 1989. The number of Evening newspapers, however, continued to decline with a loss of 17, down to 1096. Sunday editions continue to grow, up 7 from 1988 to 847. (see page 13)

* Advertising continues to account for more than 60% of the total newspaper's content. (see page 14)

TRENDS IN MEDIA
CONTENTS

Highlights.....2

Network Television Cost and CPM Trends:

Daytime (M-F).....3
Nightime (M-S).....4
Early News and Late Evening (M-F).....5

Spot Television Cost and CPM Trends:

Daytime, Early Evening, Early News, ...6
Nighttime, Late News, and Late Night 7

Magazine Advertising Cost Analysis:.....8

Newspaper Trends:

Daily Circulation, Costs and CPM's.....9
Sunday Circulation, Cost and CPM's.....10
Daily Newspapers Per Household.....11
Sunday Newspapers Per Household.....12
Number of Daily and Sunday Newspapers.....13
Ratio of Advertising to Total Content.....14

NETWORK TELEVISION COST AND CPM TRENDS

DAYTIME (M-F):

	AVERAGE PROGRAM		
	HOUSEHOLDS VIEWING AVG. MIN.	COST PER 30 SEC.	COST PER 1000 HOMES
1965	4,130,000	$2,400	$ .58
1966	4,080,000	3,000	.74
1967	4,280,000	3,500	.82
1968	4,750,000	3,800	.80
1969	4,820,000	3,700	.77
1970	4,880,000	4,000	.82
1971	5,040,000	3,600	.71
1972	5,220,000	3,700	.71
1973	5,260,000	4,300	.82
1974	5,180,000	4,500	.87
1975	5,550,000	5,200	.94
1976	5,180,000	5,800	1.12
1977	5,390,000	7,500	1.38
1978	5,400,000	7,900	1 45
1979	5,650,000	9,000	1.58
1980	5,530,000	10,000	1.81
1981	5,390,000	10,000	1.86
1982	5,330,000	10,500	1.97
1983	5,200,000	11,000	2.11
1984	5,600,000	12,500	2.22
1985	5,460,000	14,700	2.69
1986	5,430,000	14,000	2.57
1987	5,100,000	12,400	2.43
1988	5,230,000	11,800	2.26
1989	4,930,000	10,100	2.04
1990	4,340,000	10,700	2.46

SOURCE : A.C. NIELSEN
FEBRUARY EACH YEAR

NETWORK TELEVISION COST AND CPM TRENDS

NIGHTTIME (M-S):

	AVERAGE PROGRAM*		
	HOUSEHOLDS VIEWING AVG. MIN.	COST PER 30 SEC.	COST PER 1000 HOMES
1965	9,968,000	$19,700	$1.98
1966	9,873,000	19,400	1.96
1967	10,007,000	20,400	2.04
1968	11,260,000	22,200	1.97
1969	11,040,000	22,800	2.07
1970	11,430,000	24,000	2.10
1971	12,000,000	21,700	1.81
1972	12,790,000	25,100	1.96
1973	12,600,000	28,900	2.29
1974	13,380,000	30,400	2.27
1975	13,500,000	32,200	2.39
1976	13,720,000	33,000	2.41
1977	14,380,000	42,300	2.94
1978	14,620,000	45,700	3.12
1979	14,910,000	58,100	3.89
1980	15,240,000	57,900	3.79
1981	14,720,000	60,700	4.12
1982	14,140,000	69,900	4.94
1983	15,150,000	81,300	5.36
1984	14,530,000	107,500	7.39
1985	14,510,000	94,700	6.52
1986	14,460,000	98,500	6.81
1987	14,290,000	100,100	7.00
1988	13,250,000	109,000	8.22
1989	13,060,000	109,400	8.37
1990	12,540,000	122,200	9.74

SOURCE : A.C. NIELSEN
FEBRUARY EACH YEAR

*REGULAR AND SPECIALS

NETWORK TELEVISION COST AND CPM TRENDS

EARLY EVENING NEWS (M-F):

	AVERAGE PROGRAM		
	HOUSEHOLDS VIEWING AVG. MIN.	COST PER 30 SEC.	COST PER 1000 HOMES
1975	9,790,000	$12,400	$1.27
1976	9,300,000	14,400	1.55
1977	10,140,000	19,200	1.88
1978	10,270,000	21,500	2.09
1979	10,610,000	25,900	2.43
1980	11,490,000	25,700	2.23
1981	11,250,000	27,000	2.39
1982	11,080,000	31,600	2.85
1983	11,260,000	33,300	2.95
1984	10,390,000	37,000	3.56
1985	10,870,000	42,800	3.94
1986	11,570,000	45,100	3.90
1987	10,630,000	41,000	3.85
1988	10,090,000	44,500	4.41
1989	10,350,000	46,600	4.49
1990	9,570,000	51,800	5.41

LATE EVENING (M-F):

	AVERAGE PROGRAM		
	HOUSEHOLDS VIEWING AVG. MIN.	COST PER 30 SEC.	COST PER 1000 HOMES
1975	5,170,000	$8,300	$1.61
1976	4,850,000	9,000	1.86
1977	4,730,000	10,400	2.20
1978	4,910,000	8,800	1.79
1979	4,930,000	10,900	2.20
1980	4,420,000	11,900	2.70
1981	4,490,000	12,900	2.88
1982	4,450,000	13,100	2.94
1983	4,270,000	13,600	3.18
1984	4,570,000	14,800	3.24
1985	4,260,000	14,700	3.45
1986	4,310,000	15,700	3.64
1987	4,440,000	17,800	4.00
1988	3,740,000	20,200	5.40
1989	3,990,000	26,400	6.60
1990	3,080,000	21,500	6.97

SOURCE : A.C. NIELSEN
FEBRUARY EACH YEAR

SPOT TELEVISION COST AND CPM TRENDS

TOP 100 MARKETS/30-SECOND COMMERCIAL

	HOUSEHOLDS PER RATING PT.	COST PER HH RATING PT.	COST PER 1000 HH
DAYTIME (M-F):			
1982	703,092	$2,176	$3.09
1983	717,905	1,894	2.64
1984	722,326	2,190	3.03
1985	732,211	2,428	3.32
1986	739,414	2,540	3.44
1987	752,863	2,842	3.77
1988	762,958	3,089	4.05
1989	774,048	3,106	4.01
1990	790,405	3,234	4.09
EARLY EVENING (M-F):			
1982	703,092	$2,683	$3.82
1983	717,905	2,464	3.43
1984	722,326	2,680	3.71
1985	732,211	3,005	4.10
1986	739,414	2,882	3.90
1987	752,863	3,180	4.22
1988	762,958	3,535	4.63
1989	774,048	3,464	4.48
1990	790,405	3,628	4.59
EARLY NEWS (M-F):			
1982	703,092	$3,337	$4.75
1983	717,905	3,077	4.29
1984	722,326	3,414	4.73
1985	732,211	3,523	4.81
1986	739,414	3,496	4.73
1987	752,863	3,900	5.18
1988	762,958	4,477	5.87
1989	774,048	4,232	5.47
1990	790,405	4,501	5.69

SOURCES: MEDIA MARKET GUIDE, 1ST QUARTER EACH YEAR (COSTS)
A.C. NIELSEN, NSI (HOUSEHOLDS)

SPOT TELEVISION COST AND CPM TRENDS

TOP 100 MARKETS/30-SECOND COMMERCIAL

	HOUSEHOLDS PER RATING PT.	COST PER HH RATING PT.	COST PER 1000 HH
NIGHTTIME (M-S):			
1982	703,092	$6,235	$8.87
1983	717,905	5,852	8.15
1984	722,326	6,788	9.40
1985	732,211	7,360	10.01
1986	739,414	7,075	9.57
1987	752,863	7,635	10.01
1988	762,958	8,832	11.58
1989	774,048	8,535	11.03
1990	790,405	9,136	11.56
LATE NEWS (M-F):			
1982	703,092	$4,482	$6.37
1983	717,905	4,421	6.16
1984	722,326	5,104	7.07
1985	732,211	5,731	7.83
1986	739,414	5,498	7.44
1987	752,863	5,915	7.86
1988	762,958	6,552	8.59
1989	774,048	5,968	7.71
1990	790,405	6,397	8.09
LATE NIGHT (M-F):			
1982	703,092	$3,648	$5.19
1983	717,905	3,267	4.55
1984	722,326	3,460	4.79
1985	732,211	3,837	5.24
1986	739,414	3,803	5.14
1987	752,863	4,075	5.41
1988	762,958	4,564	5.98
1989	774,048	4,680	6.05
1990	790,405	4,887	6.18

SOURCES: MEDIA MARKET GUIDE, 1ST QUARTER EACH YEAR (COSTS)
A.C. NIELSEN, NSI (HOUSEHOLDS)

MAGAZINE ADVERTISING COST ANALYSIS

	COMBINED CIRCULATION (000)	COMBINED PAGE RATE		COST PER PAGE PER THOUSAND	
		BLACK & WHITE	FOUR-COLOR	B & W	4C
1965	$147,080	$595,143	$826,879	$4.05	$5.53
1966	151,786	616,084	860,740	4.06	5.67
1967	156,679	635,471	887,383	4.06	5.66
1968	160,576	659,293	917,668	4.11	5.71
1969	158,510	675,018	930,627	4.26	5.87
1970	160,848	695,674	961,293	4.33	5.98
1971	159,131	692,397	958,292	4.35	6.02
1972	155,738	678,665	934,180	4.36	6.00
1973	156,971	679,836	930,286	4.33	5.93
1974	158,978	714,535	976,630	4.49	6.14
1975	155,674	754,298	1,031,318	4.85	6.62
1976	156,816	775,337	1,061,126	4.94	6.77
1977	155,129	824,443	1,142,234	5.32	7.36
1978	154,997	908,735	1,247,793	5.86	8.05
1979	155,177	986,848	1,350,364	6.36	8.70
1980	155,130	1,097,861	1,508,088	7.08	9.72
1981	153,763	1,215,085	1,665,926	7.90	10.83
1982	151,366	1,329,932	1,815,461	8.79	11.99
1983	149,852	1,429,357	1,944,815	9.54	12.98
1984	148,150	1,525,433	2,078,618	10.29	14.03
1985	159,978	1,695,541	2,288,036	10.59	14.30
1986	161,189	1,831,185	2,502,235	11.36	15.52
1987	161,507	1,991,011	2,689,310	12.33	16.65
1988	162,833	2,021,742	2,726,575	12.42	16.74
1989	152,258 *	2,080,357	2,807,563	13.66	18.44

SOURCE: MAGAZINE PUBLISHERS ASSOCIATION, INC.
BASED ON THE CIRCULATION AND RATES FOR THE 50 LEADING MAGAZINES IN ADVERTISING REVENUE FOR EACH YEAR.

* Decrease in circulation due to National Geographic, with over 10.7 million circulation, dropping from top 50 revenue list.

DAILY NEWSPAPERS IN THE U.S.

CIRCULATION, COSTS & COST PER 1000'S

	TOTAL DAILY CIRCULATION (000)	COST 1/2 PAGE EACH DAILY**	COST PER 1000 CIRCULATION
1965	60,358	$312,112	$5.17
1966	61,397	334,398	5.45
1967	61,561	337,987	5.49
1968	62,535	352,394	5.64
1969	62,060	370,198	5.97
1970	62,108	391,324	6.30
1971	62,231	406,409	6.53
1972	62,510	419,566	6.71
1973	63,147	446,659	7.07
1974	61,877	508,076	8.21
1975	60,655	561,785	9.26
1976	60,977	620,296	10.17
1977	61,495	655,421	10.66
1978	61,990	743,658	12.00
1979	62,223	802,007	12.89
1980	62,202	899,706	14.46
1981	61,431	968,723	15.77
1982	62,487	1,091,239	17.46
1983	62,645	1,198,680	19.13
1984	63,082	1,362,073	21.59
1985	62,766	1,515,163	24.14
1986	62,502	1,584,442	25.35
1987	62,826	1,580,006	25.15
1988	62,695	1,803,335	28.76
1989	62,649	1,830,572	29.22

SOURCE: EDITOR & PUBLISHER'S INTERNATIONAL YEARBOOK

**63-COLUMN INCHES (1/2 PAGE) STARTING IN 1984.' PRIOR TO 1984 IT WAS 1000 LINES. COSTS ARE BASED ON THE NATIONAL OPEN RATE. RETAIL RATES WOULD BE APPROXIMATELY 60% OF THE NATIONAL FIGURE.

SUNDAY NEWSPAPERS IN THE U.S.

CIRCULATION, COSTS & COST PER 1000'S

	TOTAL SUNDAY CIRCULATION (000)	COST 1/2 PAGE EACH DAILY**	COST PER 1000 CIRCULATION
1965	48,600	$182,559	$3.76
1966	49,282	190,236	3.86
1967	49,224	198,214	4.03
1968	49,693	207,394	4.17
1969	49,675	219,068	4.41
1970	49,217	230,246	4.68
1971	49,665	238,326	4.80
1972	50,001	249,876	5.00
1973	51,717	273,001	5.28
1974	51,679	318,968	6.17
1975	51,096	358,745	7.02
1976	51,565	388,102	7.53
1977	52,429	432,767	8.25
1978	53,990	498,785	9.24
1979	54,380	563,389	10.36
1980	54,676	647,179	11.84
1981	55,180	770,890	13.97
1982	56,261	864,587	15.37
1983	56,747	972,321	17.13
1984	57,574	1,092,847	18.98
1985	58,826	1,252,247	21.29
1986	58,925	1,290,104	21.89
1987	60,112	1,401,028	23.31
1988	61,474	1,651,846	26.87
1989	62,008	1,737,486	28.02

SOURCE: EDITOR & PUBLISHER'S INTERNATIONAL YEARBOOK
**63 COLUMN INCHES (1/2 PAGE) STARTING IN 1984. PRIOR TO 1984 IT WAS 1,000 LINES. COSTS ARE BASED ON THE NATIONAL OPEN RATE. RETAIL RATES WOULD BE APPROXIMATELY 60% OF THE NATIONAL FIGURE.

DAILY NEWSPAPERS PER HOUSEHOLD

	TOTAL U.S. HOUSEHOLDS	TOTAL DAILY NEWSPAPERS CIRCULATION	DAILY NEWSPAPERS PER HOUSEHOLD
	(000)	(000)	
1965	56,900	60,358	1.06
1966	57,900	61,397	1.06
1967	58,900	61,561	1.05
1968	59,900	62,535	1.04
1969	61,300	62,060	1.01
1970	61,410	62,108	1.01
1971	62,910	62,231	.99
1972	64,850	62,510	.96
1973	67,210	63,147	.94
1974	68,310	61,877	.91
1975	70,520	60,655	.86
1976	71,460	60,977	.85
1977	73,100	61,495	.84
1978	74,700	61,990	.83
1979	76,240	62,223	.82
1980	77,900	62,202	.80
1981	81,480	61,431	.75
1982	83,120	62,487	.75
1983	84,940	62,645	.74
1984	85,430	63,082	.74
1985	86,530	62,766	.73
1986	87,590	62,502	.71
1987	89,130	62,826	.70
1988	90,270	62,695	.69
1989	92,030	62,649	.68

SOURCE: A.C. NIELSEN, EDITOR & PUBLISHER

SUNDAY NEWSPAPERS PER HOUSEHOLD

	TOTAL U.S. HOUSEHOLDS	TOTAL SUNDAY NEWSPAPERS CIRCULATION	SUNDAY NEWSPAPERS PER HOUSEHOLD
	(000)	(000)	
1965	56,900	48,600	.85
1966	57,900	49,282	.85
1967	58,900	49,224	.84
1968	59,900	49,693	.83
1969	61,300	49,675	.81
1970	61,410	49,217	.80
1971	62,910	49,665	.79
1972	64,850	50,001	.77
1973	67,210	51,717	.77
1974	68,310	51,679	.76
1975	70,520	51,096	.72
1976	71,460	51,565	.72
1977	73,100	52,429	.72
1978	74,700	53,990	.72
1979	76,240	54,380	.71
1980	77,900	54,676	.70
1981	81,480	55,180	.68
1982	83,120	56,261	.68
1983	84,940	56,747	.67
1984	85,430	57,574	.67
1985	86,530	58,826	.68
1986	87,590	58,925	.67
1987	89,130	60,112	.67
1988	90,270	61,474	.68
1989	92,030	62,008	.67

SOURCE: A.C. NIELSEN, EDITOR & PUBLISHER

NUMBER OF DAILY AND SUNDAY NEWSPAPERS

	MORNING	EVENING	ALL DAY	TOTAL DAILY	SUNDAY
1965	307	1,431	13	1,751	562
1966	310	1,430	14	1,754	578
1967	311	1,422	16	1,749	573
1968	309	1,424	19	1,752	578
1969	315	1,425	18	1,758	585
1970	319	1,414	15	1,748	586
1971	324	1,410	15	1,749	590
1972	320	1,424	17	1,761	605
1973	323	1,431	20	1,774	634
1974	319	1,428	21	1,768	641
1975	320	1,417	19	1,756	639
1976	327	1,416	19	1,762	650
1977	331	1,414	21	1,766	668
1978	337	1,401	18	1,756	696
1979	358	1,381	24	1,763	720
1980	357	1,358	30	1,745	736
1981	378	1,322	30	1,730	755
1982	401	1,277	33	1,711	768
1983	417	1,255	29	1,701	772
1984	431	1,230	27	1,688	783
1985	456	1,194	26	1,676	798
1986	469	1,158	30	1,657	802
1987	479	1,134	32	1,645	820
1988	501	1,113	28	1,642	840
1989	501	1,096	29	1,626	847

SOURCE: EDITOR & PUBLISHER'S YEARBOOK.

RATIO OF ADVERTISING TO TOTAL CONTENT
IN DAILY & SUNDAY NEWSPAPERS

	% AD CONTENT	% OTHER	% TOTAL
1965	60.5	39.5	100.0
1966	61.7	38.3	100.0
1967	61.2	38.8	100.0
1968	61.9	38.1	100.0
1969	62.0	38.0	100.0
1970	61.5	38.5	100.0
1971	62.6	37.4	100.0
1972	64.4	35.6	100.0
1973	65.5	34.5	100.0
1974	65.6	34.4	100.0
1975	64.0	36.0	100.0
1976	63.5	36.5	100.0
1977	63.1	36.9	100.0
1978	63.4	36.6	100.0
1979	63.7	36.3	100.0
1980	62.6	37.4	100.0
1981	62.3	37.7	100.0
1982	62.2	37.8	100.0
1983	62.5	37.5	100.0
1984	63.0	37.0	100.0
1985	62.8	37.2	100.0
1986	62.2	37.8	100.0
1987	62.0	38.0	100.0
1988	62.7	37.3	100.0
1989	61.6	38.4	100.0

SOURCE: MEDIA RECORDS